



Filing ID #10022260

# FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

## FILER INFORMATION

**Name:** Dr. Jennifer Hoppe Vipond  
**Status:** Congressional Candidate  
**State/District:** WI05

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/11/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Associated Bank [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Focus Credit Union [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Frog Haven [RP]	JT	\$250,001 - \$500,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: New Orleans, LA, US					
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Investors Associated [PS]	JT	\$500,001 - \$1,000,000	Capital Gains	\$50,001 - \$100,000	\$100,001 - \$1,000,000
DESCRIPTION: Real Estate Holding Company					
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA [MF]	JT	\$500,001 - \$1,000,000	Capital Gains, Dividends, Interest	None	\$100,001 - \$1,000,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	None	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒	JT	\$15,001 - \$50,000	Capital Gains,	\$201 -	\$5,001 -

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Prohealth Care Medical Associates Inc 457(b) Plan for Providers [MF]			Dividends, Interest	\$1,000	\$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan [MF]	JT	\$500,001 - \$1,000,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$50,001 - \$100,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan [MF]	JT	\$100,001 - \$250,000	Capital Gains, Dividends, Interest	\$2,501 - \$5,000	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Cohen & Steers Fund Pref Securities & Income I [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA Emerging markets Core Equity I [MF]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA Emerging Markets Small Cap PTF [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA FIVE_YEAR GLOBAL FIXED PTF [MF]	JT	\$1,001 - \$15,000	Dividends	None	None
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA International Core Equ PTFL [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA INTL SM CAP VAL PORT [MF]	JT	\$50,001 - \$100,000	Dividends	None	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA US LARGE CAP VALUE I [MF]	JT	\$50,001 - \$100,000	Dividends	None	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒	JT	\$15,001 - \$50,000	Dividends	\$2,501 -	\$5,001 -

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Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA US LRG CAP GROWTH PORTFOLIO [MF]				\$5,000	\$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ DFA US SMALL CAP I [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Doubleline Core fixed Income I [MF]	JT	\$1,001 - \$15,000	Dividends	None	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Ishares Core S&P MCP ETF [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ PIMCO o-5 High Yield ETF [EF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Vanguard Real Estate ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Vanguard Short term Investment Grade FD [MF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian ⇒ Vanguard Total Stock MKT Index Admiral [MF]	JT	\$100,001 - \$250,000	Dividends	\$5,001 - \$15,000	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA Emerging Markets Core Equity I [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$1,001 - \$2,500
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA Emerging Markets Small Cap PTF [MF]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA Five Year Global Fixed PTF [MF]	JT	\$1,001 - \$15,000	Dividends	None	\$1 - \$200
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA International Core Equ PTF [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA Intl SM CAP VAL PORT [MF]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA US Large Cap Value I [MF]	JT	\$15,001 - \$50,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA US LRG CAP GROWTH PORTFOLIO [MF]	JT	\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ DFA US Small Cap [MF]	JT	\$15,001 - \$50,000	Dividends	\$5,001 - \$15,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ Ishares Core S&P MCP ETF [EF]	JT	\$1,001 - \$15,000	Dividends	\$2,501 - \$5,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ PIMCO 0-5 High Yield ETF [EF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ Vanguard Interm-term Investment Grade [MF]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000

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Custodian ⇒ Vanguard Real Estate ETF [EF]					
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian ⇒ Vanguard Shrt-term BD Index- Admiral [MF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Care Medical Associates Inc 457(b) Plan for Providers ⇒ American Funds Trgt Date Ret 2055 R6 [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Care Medical Associates Inc 457(b) Plan for Providers ⇒ Goldman Sachs Small-Cap Value Instl [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ American Funds EuroPacific Gr R6 [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ American Funds Trgt Date Ret 2025 R6 [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ American Funds Trgt Date Ret 2030 R6 [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ American Funds Trgt Date Ret 2035 R6 [MF]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ Vanguard Total Stock Market Idx I [MF]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	\$15,001 - \$50,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan ⇒ Wells Fargo Emerging Mrkts Eqty Inst [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Upper Level Lake Property LLC ⇒ Upper Lever Lake Property LLC [RP]	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
LOCATION: Hartland, WI, US					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ American Beacon Lg Cap Value Inst [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ American Funds Trgt Date ret 2025 R6 [MF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$2,501 - \$5,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ Goldman Sachs Small Cap Value Instl [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ Metropolitan West Total Return Bond M [MF]	JT	\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ Pioneer Disciplined Growth Y [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ Vanguard Total Stock Market Idx I [MF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan ⇒ Weels Fargo Emerging Mrkts Eqty Inst [MF]	JT	\$15,001 - \$50,000	Dividends	None	\$5,001 - \$15,000

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Prohealth Medical Associates	My salary	\$165,000.00	\$309,649.46
Brookfield Academy	Spouse salary	\$ .00	\$1,200.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Visa	2017	Credit Card debt	\$15,001 - \$50,000
	American Express	2017-2018	Credit Card debt	\$10,000 - \$15,000
	Associated Bank	2015	Mortgage on Rental aproperty	\$250,001 - \$500,000
	Sun Trust Mortgage	June 2017	Mortgage for Rental Property	\$100,001 - \$250,000
	Associated Bank	2016	Home equity loan on rental property	\$15,001 - \$50,000
DC	Sun Trust Mortgage	July 2016	Co-signed a mortgage	\$250,001 - \$500,000
	Mastercard	2017-2018	Credit Card debt	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust (Owner: JT)</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Jennifer Vipond Rollover IRA TD Ameritrade Clearing, Custodian (Owner: JT)</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Mark Vipond Rollover IRA TD Ameritrade Clearing Custodian (Owner: JT)</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Care Medical Associates Inc 457(b) Plan for Providers (Owner: JT)</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Prohealth Retirement Savings Plan (Owner: JT)</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Upper Level Lake Property LLC (Owner: JT) LOCATION: US DESCRIPTION: Rental property in Hartland, WI</li><li>◦ Mark R. and Jennifer Vipond H. Revokable Trust ⇒ Waukesha Health System Inc. Deferred Compensation Plan (Owner: JT)</li></ul>
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## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Dr. Jennifer Hoppe Vipond , 05/11/2018